Sage E-marketing for Sage CRM

Quick Start Guide To:

PDF's a.ka. Attachments Linked to Text

The traditional attachment and paper clip icons that you may be used to are done a little differently in Sage E-marketing for Sage CRM for tracking and functionality purposes. Instead of doing a word document or image as an attachment, we do PDFs. So, if you have a document you want to attach and track whether or not it was clicked on, we allow you to essentially attach a PDF, that can be accessed by your recipients by clicking on a piece of linked text in your email or a linked image. The whole idea is that you will now be able to track every interaction with your PDFs / attachments.

Inserting a PDF

-Click on Content Editor within the Sage E-marketing for Sage CRM Online Editor

-Click on PDF Options

-Click on Upload a PDF and select your PDF

(Tip- After you hit Submit, the changes won't take place until after performing the next step below. You will also want to make sure the size of your PDF is 4MB or less or else it will not load.)

 Linking the PDF to Text

-After following steps for Uploading, select the window that you want your PDF to reside in and click on Link Text to PDF

-Type the exact text that already exists in that window into the field provided

-After hitting Submit the text you entered will be linked to your PDF and you are done

(Tip- One PDF per window is the maximum.)
(*Tip- There are numerous programs out there, that can convert just about any document into a PDF. One group that has worked well for us can be reached through http://www.primopdf.com/.)

Sage E-marketing for Sage CRM does not guarantee or technically support the results of the PrimoPDF group.